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# Executive summary

# Q4 2022

Including Q1 - Q4 cumulative summary

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Prepared on behalf of:



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## Q4 2022

# Introduction

Market insight is crucial for business success, and English UK is committed to supporting members by providing better and faster information.

As in the pre-pandemic years, our optional student statistics scheme, the Quarterly Intelligence Cohort (QUIC), continues on a quarterly basis. It introduces features not available in our annual student statistics reports. This is the executive summary of the fourth report in the 2022 series and so in addition to the Q4 results includes cumulative data for the full 2022 year.

QUIC provides an in-depth analysis of the UK English language teaching (ELT) industry's source markets. Whilst the executive summaries are made publicly available, the full reports are exclusive to QUIC members, who can use them to benchmark their performance and monitor market trends.

Added value has been maintained by outsourcing the data processing and subsequent analysis to BONARD, an independent market research firm and member of ESOMAR World Research. Two-tiered data validation and reporting to international research standards means that the market intelligence remains exact, precise and reliable.

Members can be confident in the robustness of this executive summary and its value in helping them make well-informed, time-critical business decisions just weeks after the quarter's end.

In Q4 2022, the cohort of QUIC scheme participants remained the same as in Q3, thus 120 member centres. The current sample now represents 36% of the overall English UK member base. To reflect the diverse nature of the sector and the association's membership, data was gathered from year-round and seasonal centres, as well as Higher Education (HE) and Further Education (FE) colleges from both the private and state sector.

Having collected the full data set from participating members in 2021, it was possible to return to featuring a historical comparative analysis not only of overall figures but also by various breakdowns.









The enhanced sectoral, regional and provider-type breakdowns are shared only with the QUIC cohort in the form of accompanying pivot tables. These are supplied to the participants user-friendly way to offer them more granular intelligence and benchmarks tailored to their organisation.

For more information on QUIC, please visit [www.englishuk.com/quic](http://www.englishuk.com/quic) or email [statistics@englishuk.com](mailto:statistics@englishuk.com).

**Note:** Data is provided in student weeks, defined as one student taking 10 or more teacher-taught hours in one week. Those studying fewer hours are excluded from the calculations.

# Q4 2022 Overview

**Table 1**  
QUIC region summary

Region	No. of returns	Proportion of returns	Total weeks	Market share
		%	Σ	%
 South and South Eastern England	25	24.8%	16,666	18.0%
 London	22	21.8%	28,765	31.1%
 Northern England	22	21.8%	21,524	23.3%
 South West England and The Channel Islands	16	15.8%	14,656	15.9%
 Eastern England	9	8.9%	6,185	6.7%
 Central England and Wales	4	4.0%	2,353	2.5%
 Scotland and Northern Ireland	3	3.0%	2,262	2.4%
<b>Total</b>	<b>101</b>	<b>100.0%</b>	<b>92,411</b>	<b>100.0%</b>

n=120 participating members in Q4 2022

**Note:** The number of participating member centre locations in Q4 2022 is 101. This number differs per quarter and depends on when teaching centre locations are operational.

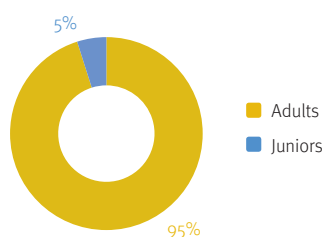
**Note:** Figures of student weeks per region were rounded and do not add up to the total sum of student weeks.

**Note:** In order to maintain the confidentiality of individual centre data, some of the regions were merged.

# Q4 2022 Overview

A total of 120 English UK member centres registered for the QUIC scheme in Q4 2022, representing 235 teaching centre locations. This quarter 101 teaching centre locations were operational and recorded a total of 92,411 student weeks.

**Chart 1**  
Student weeks by age group



n=120 centres participating in Q4 2022

The ratio of adult to junior student weeks for Q4 2022 averaged out at 95% to 5% (87,877 adult to 4,534 junior student weeks).

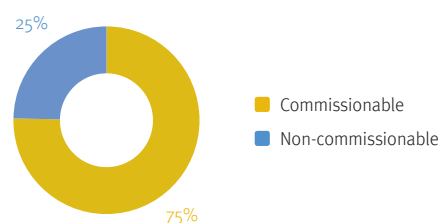
Overall the 118 members that reported in both Q4 2021 and Q4 2022 saw student weeks increase by 44%. Whilst junior figures soared by 346.7%, in terms of absolute figures, the increase was generated primarily by adult student weeks (up 24,960).

Period	Total weeks	Junior weeks	%	Adult weeks	%
Q4 2021	63,897	988	2%	62,910	98%
Q4 2022	92,282	4,412	5%	87,870	95%
<b>Change</b>	<b>+ 44.4%</b>	<b>+346.7%</b>		<b>+39.7%</b>	

**Note:** The figures relate to a like-to-like comparison, which is based on data from centres reporting in both Q4 2021 and Q4 2022 (n=118 centres).

**Note:** Any students under the age of 18 who are studying on courses for adults are recorded as 'adult' (the course type overrides the date of birth of the student).

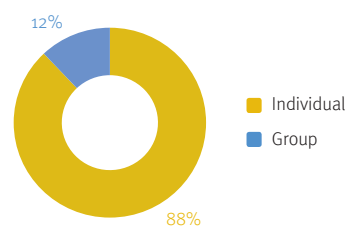
**Chart 2**  
Student weeks by booking source



n=120 centres participating in Q4 2022

In Q4 2022, four in five student weeks were commissionable.

**Chart 3**  
Student weeks by booking type



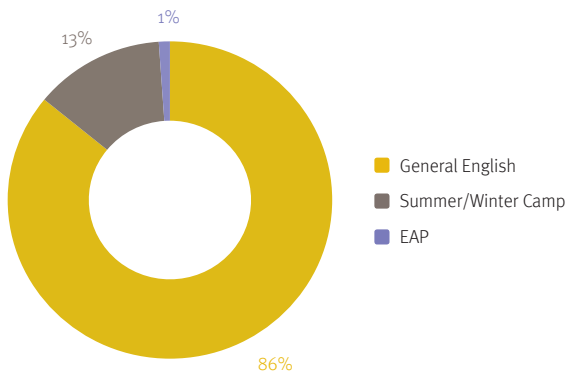
n=120 centres participating in Q4 2022

In Q4 2022, group bookings accounted for 12% of the total student weeks, double the proportion seen in Q4 2021 (6%).

**Note:** 'Group' is defined as at least two students travelling and studying on the same itinerary.

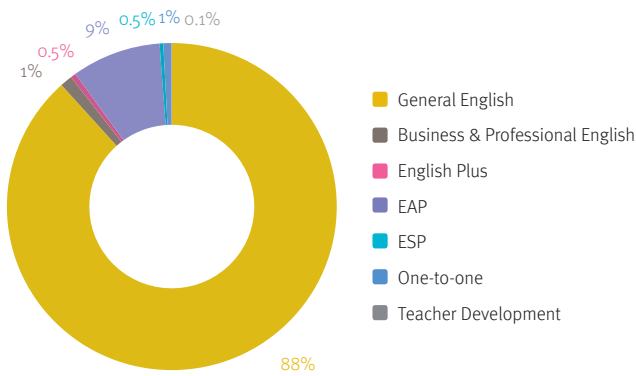
# Q4 2022 Overview

**Chart 4**  
Student weeks by junior course types



n=120 centres participating in Q4 2022

**Chart 5**  
Student weeks by adult course types



n=120 centres participating in Q4 2022

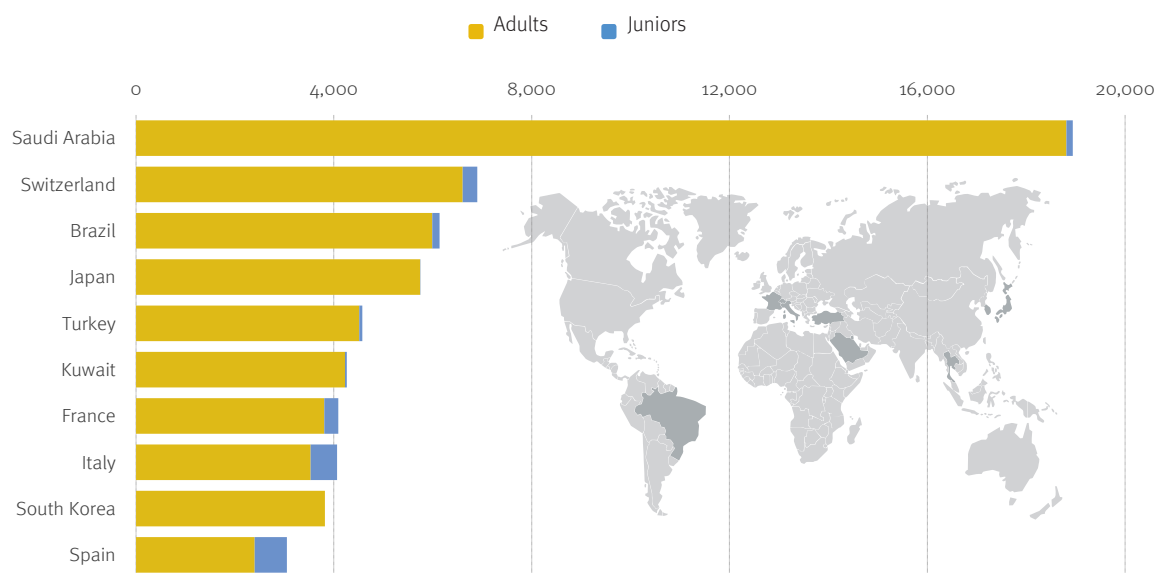
Student weeks spent on General English courses dominated in both age groups (86% junior weeks; 88% adult weeks). This proportion is slightly higher than that observed pre-pandemic: in Q4 2019, the figures were 79% and 82% respectively.

Although accounting for only 589 student weeks, Summer/Winter Camps were the second most attractive (13%) course type for juniors. For adults English for Academic Purposes (EAP) occupied the second position (9%), as is traditional.

# Q4 2022 Overview

## Chart 6

Student weeks by age group and source country (top 10 markets)



n=120 centres participating in Q4 2022

In Q4 2022, the top 10 markets represented 67% of all student weeks.

Saudia Arabia ranked as the top source market in Q4 2022, with a total of 18,940 student weeks. With 5,145 more student weeks than in Q4 2021, it also had the biggest increase in absolute numbers.

Switzerland took the overall second position, with 6,898

student weeks (+2,708 compared to Q4 2021), closely followed by Brazil in third position with 6,138 student weeks and impressive growth (+ 4,583 student weeks) in comparison to Q4 2021.

Kuwait, dropped from the second-largest source market by total student weeks in Q4 2021 to 6<sup>th</sup> place in Q4 2022.

# 2022 Summary Overview

This section presents cumulative data for the full 2022 year. The figures relate to data from the 120 English UK member centres in QUIC that participated in all four quarters of 2022.

**Table 2**  
QUIC 2022 region summary

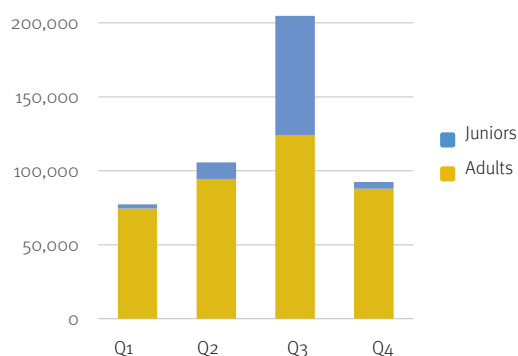
Region	Q1		Q2		Q3		Q4		2022	
	No. of returns	Proportion of returns	No. of returns	Proportion of returns	No. of returns	Proportion of returns	No. of returns	Proportion of returns	No. of returns	Proportion of returns
South and South Eastern England	25	25.0%	34	28.8%	55	30.2%	25	24.8%	139	27.7%
London	23	23.0%	28	23.7%	42	23.1%	22	21.8%	115	23.0%
Northern England	19	19.0%	21	17.8%	25	13.7%	22	21.8%	87	17.4%
South West England and The Channel Islands	15	15.0%	17	14.4%	22	12.1%	16	15.8%	70	14.0%
Eastern England	10	10.0%	10	8.5%	21	11.5%	9	8.9%	50	10.0%
Central England and Wales	4	4.0%	4	3.4%	12	6.6%	4	4.0%	24	4.8%
Scotland and Northern Ireland	4	4.0%	4	3.4%	5	2.7%	3	3.0%	16	3.2%
<b>Total</b>	<b>100</b>	<b>100.0%</b>	<b>118</b>	<b>100.0%</b>	<b>182</b>	<b>100.0%</b>	<b>101</b>	<b>100.0%</b>	<b>501</b>	<b>100.0%</b>

**Note:** The number of participating member centres in all quarters of 2022 was 120.

**Note:** The number of returns differs per quarter as this is submitted on a 'per teaching premise location' basis and so depends on when teaching centre locations are operational.

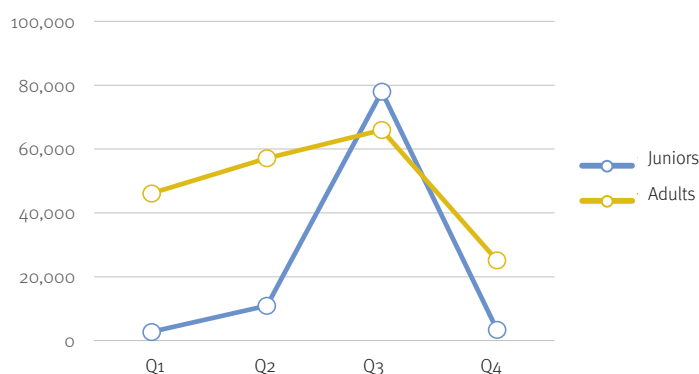
**Note:** Percentages do not add up to 100% due to rounding.

**Chart 7**  
Student weeks by quarter and age group



**Note:** The figures in Chart 7 relate to data from centres reporting in all four quarters of 2022 (n=120 centres).

**Chart 8**  
Absolute year-on-year change in student weeks (2022 vs 2021)



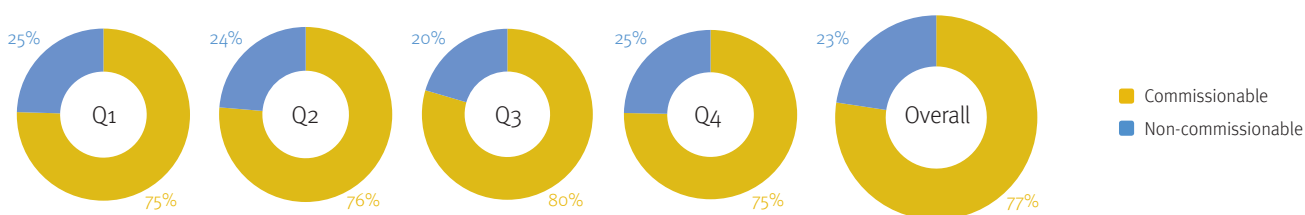
**Note:** The figures in Chart 8 relate to a like-to-like comparison, which is based on data from centres participating in both 2021 and 2022 (n=118 centres).



# 2022 Summary Overview

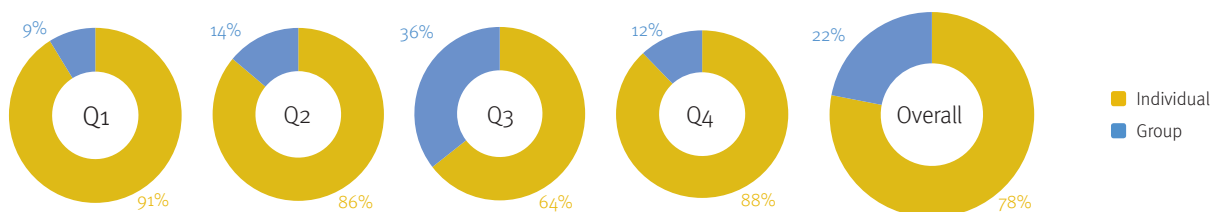
**Chart 9**

Student weeks by quarter and booking source



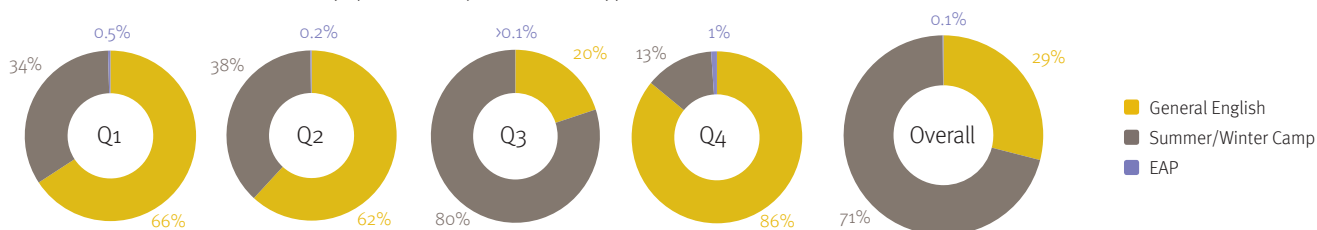
**Chart 10**

Student weeks by quarter and booking type



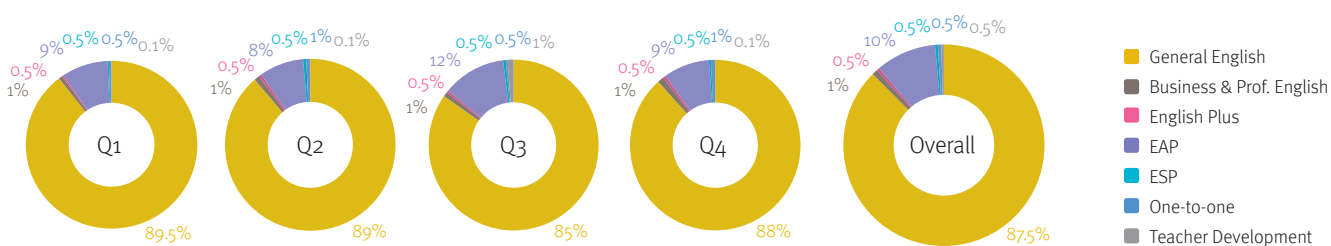
**Chart 11**

Student weeks by quarter and junior course types



**Chart 12**

Student weeks by quarter and adult course types



**Note:** Percentages do not add up to 100% due to rounding.

**Note:** The figures in Charts 9, 10, 11 and 12 relate to data from centres reporting in all four quarters of 2022 (n=120 centres).

# **QUIC** QUARTERLY INTELLIGENCE COHORT



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